

**MSC Content Management Committee
Minutes**

Tuesday, August 16, 2016

Locations: Online (GoToMeeting) and sapphire Room, Montana State Library, Helena

Members Present:

Online – Jodie Moore (Red lodge), Dave Shearer (Billings), Beth Boyson (Bozeman), Marilyn Trosper (N. Lake), Janice Kalvig (ImagineIF), Carly Delsigne (N. Jefferson), Amy Marchwich (MSC), Katy Callon (MDT), Jessie Goodwin (MSC).

Helena – Laura Tretter (His. Society), Jemma Hazen (MSC), Stephan Licitra (Law Library), Bobbi deMontigny (MSC).

Minutes: Stephan Licitra

Call to order

Jodie Moore called the fall meeting of the Content Management Committee (CMC) at 10am on August 16, 2016.

Introductions

Jodie introduced everyone to the newest member of the board, Katy Callon, from the Montana Department of Transportation Library. Katy fills the special government library position left open by Allison Badger in January. Jodie also noted that there were a few changes needed on the MSC website regarding the CMC. Jemma will update the page.

Minutes

The minutes for the last CMC meeting (March 24, 2016) were read. There were a few corrections requested. The minutes will be resubmitted online after the meeting. The minutes were approved as [will be] corrected.

Checking in with MSC staff

Jemma reported that the MSC has been very busy with trainings, updates and finishing the Reorganization of policies in the MSC. Jemma recently returned from API training and will be using it to finish the last of the 007 field updates. Up to this point she has been using MARCedit; which is very effective but not as fast. Bobbi is finishing up her training curriculum and is expecting to share it at the MSL fall workshop on September 14th. The reorg. is almost complete, there only remains to have the finally emptied policies removed by SirsiDynix. That process is slated to begin August 19. The Ad Hoc committee for Cataloging Collaboration is currently researching how other consortiums approach cataloging. They will give a presentation at the MSC fall membership meeting. The fall membership meeting will be at Carroll College on October 5th and 6th. MSL will not be doing trainings at the MSC membership meetings; instead they will do two workshops each year, throughout the state in an effort to bring trainings closer to libraries. The first of these workshops will be in Polson. The MSC will present two sessions at the workshop. In the morning, Jemma will present on the Standard Cataloging Procedures (SCP) and basic cataloging. In the afternoon, Bobbi will give an overview of her training curriculum.

There is one more regional training left this summer. This will be held at Chouteau County library in Fort Benton on Wednesday, August 24th.

MSC Executive Board Retreat

The MSC executive board retreat was held in Virginia City, MT on Wednesday, July 13. They discussed concerns relating to membership dues and considered ways to modify the budget formula. The board discussed the Ad Hoc committee on Cataloging Collaboration. This committee had just met, and was discussing how they would pursue their questions. The board named two members to act as Data Coordinators. These Data coordinators will work to collect data on ongoing projects in the MSC. The coordinators are Diane Anderson, and Wendy Campbell.

Subcommittee Reports

- ISBN (Dave, Paulette, Laura, Jemma)
This subcommittee has mostly collaborated by email. Since 020, subfield z will no longer be indexed; they need to work on updating the sections of the SCP relating to ISBNs. They look to present their recommendations to the spring CMC meeting.
- Hyperlink (Beth, Stephan, Carrie, Laura, Jemma)
The Hyperlink subcommittee met on August 8th. They shared research and discussed the ideas resulting thereof. One of the ideas was to survey the membership about some of the issues they face relating to hyperlinks. They too will have recommendations to make at the spring CMC meeting.

Standard Cataloging Procedures – Edits

The committee discussed possible additions or changes to the SCP, but decided to let committee members recommend changes at the spring CMC meeting. After the committee has voted on the edits, Jemma will add the corrections to the document. Updates to the SCP include expanding the examples, rewriting language and adding video links. The members also discussed mechanisms to make record improvements faster. Suggested edits will be posted online for discussion, from individuals, by November; from committees, by January.

- 007 (physical characteristics) – Jemma Hazen will review. (There is a need for more examples.)
- 020 (ISBN) – ISBN subcommittee will have recommendations.
- 250 (edition statements) – Beth Boyson
- 33x(RDA descriptors) – Janice Kalvig. (Section needs a new subsection.)
- 856 (electronic access) – hyperlink subcommittee

Standard Cataloging Procedures - Record Standards

Dave Shearer presented copies of catalog records loaded into the MSC from Baker and Taylor and comparative records from OCLC. Dave then asked whether the committee felt these records represented quality and if not what changes could be made to the SCP? Members felt that the records presented, while not always the greatest, were quality records and met our

standards. Jemma reminded the committee that we could make the standards stricter, but enforce them is a question. Also the standards apply to both little and bigger libraries, and so need to be, fairly, applicable to both. Jodie asked whether tightening the standards would improve patron access (the end goal of all our work). In the end, the committee decided we did not need to modify our permanent record standards at this point.

Jemma observed that many of the lowest quality records are contributed by incoming member libraries. The MSC has developed a process to review new records, coming from new libraries, that don't match current OCLC numbers. These records are flag in Category 5 with the label "Review." This process has been very helpful in identifying records that need cleaning up. But the MSC may need language in the contract specifying that members clean up their individual records.

Of greatest concern to all committee members was the quality and duplication of records imported into the catalog by member libraries. This problem is more decentralized and thus is more insidious. The issues involved include: lack of training; unawareness of standards (or possible training); improper property settings; searching and retrieval issues; high library turnover rates; high learning curve; and lack of time. Methods to address some of these problems include: adding new language to members' contracts emphasizing quality records and record clean up; discussing quality record issues at membership meetings; restricting use of import tools until staff can be trained to meet MSC standards. Jemma said it was possible to adjust new library's default settings so that fewer mistakes were made at that point.

The last idea, to restrict the use of Smartport for member libraries which habitually bringing in duplicate records, was considered useful. Jodie will draft a recommendation for the MSC executive board and send it out to the committee for review. Jemma will provide numbers for this project. It is unknown if this proposal has to be voted on by the membership or not.

Committee members wondered what role collaborative cataloging might play in improving catalog quality. Jemma reported that she discovered, for the ad hoc committee, that smaller libraries have a ratio of bibliographic to holding records of about 1:1, while the ratio for larger libraries is smaller ratio. If this is true then, smaller libraries are not fully realizing the potential of the catalog. However, further data will be needed in the future to flesh out this point. A 1:1 ratio would mean that members are likely bring in duplicate records. Jodie pointed out that some schools might be duplicating records because they want to add lexiles.

The committee felt that many of the issues relating to poor and duplicate records could be addressed by educating and training the membership. Surveys show that MSC membership feels there is a lack of training. This is perplexing for the MSC staff, which has produced a great deal of training materials. So the question is, where is the disconnect? Perhaps the Tip of the Month would be an effective method lead people to the trainings available online.

Jemma said that if the duplication could be decreased, the MSC could run more hygiene reports. Hygiene reports might be an effect tool to improve records, but Jemma also

questioned who would fix the records found. Carly asked how much time the MSC spent de-duping? Jessie said the MSC doesn't de-dup, that they have money set aside for that, but that they had not been able to use it because of the rules in the Affordable Care Act (ACA). It will be added to the March agenda to make a recommendation to the MSC executive board about the de-duping project. This project may need to go to a third party, which could mean sending out Requests for Information (RFI) and Requests for Proposals (RFP).

Carly asked if libraries with the most problems keeping standards were known, and if so would talking to them directly be effective. Jemma said that some outreach has been done and she has encouraged mentors to contact those libraries. However, being strategic is time consuming.

All members also agreed that batch loaded records (like vendor records but others also), should have a process to insure continual quality (for example, randomly checking a number of records in each batch load). But that the process for assuring quality was up to individual libraries. Jemma said that because of the standards, it should be fairly simple to spot problems. The CMC may wish to review language for batch loads in the SCP [section 3.5].

The committee discussed record enhancements like tracing series and FAST headings. However, since series are not traced nationally this is a time consuming process. It was decided not to add it to the record standard at this time. Janice said that bigger and medium libraries should consider adding them as they are very important to users. In the SCP serial tracings are 6.4, but there is no training currently on this section. The committee recommends the MSC look into making a training video for this section.

The committee briefly discussed BlueCloud Cataloging. Jessie reported that the module was not ready yet. The consortium will have to wait until SirsiDynix had added certain functions like customized policies and tiered access. This is a concern for all consortiums who are considering using the module.

Standard Cataloging Procedures – Format

Jodie observed that the SCP was very long and requested the committee's suggestions for improvement. Jemma agreed that the SCP was too long and missed important concepts; it didn't even have adding items. The committee generally recognized that the SCP is pulling double duty as standards and procedures and didn't do well at either. Dave observed that the standards could not be made simpler, without compromising the catalog. Jodie wondered whether people even got past page 7. Laura suggested moving the SCP to a wiki format. That format would more naturally support the MSC movies and other interactive features. Beth observed that Bozeman public library has everything on a wiki. She would be willing to share theirs with us as example.

The board was also concerned that the members were not referring to the standards or if they even had the correct one. Katy reported that a google search resulted in the 2014 SCP [not the current 2015]. Jemma had suggested adding this to the CMC survey. The committee decided to leave the SCP as is pending further information.

Checking in with Enterprise

Jessie reported that SirsiDynix is working on adding responsive design to enterprise. This will improve the function of the OPAC on mobile devices. They have also improved short string searches making it easier to discover items with short titles. (This can be a big problem for consortiums.) Testing has shown that this improvement functions very well. So, we can expect to see improvements in the short string searching in the next update. Enterprise has not been going down as much and SirsiDynix has been quick to bring the server back up when it does have problems. The MSC is still looking into problems with acquisitions and search limits.

Marilyn asked why some summaries were not showing up. The MSC receives many of its summaries from Sydenetics. These summaries display as a drop down below the record. Sometimes no summaries display, in this case it is likely that neither Sydenetics nor MARC have summaries. Jessie also said that there were only a few search display templates, and that the templates were a compromise between speed and information.

Laura asked what was happening with libraries individually modifying the home pages of Enterprise. The MSC is looking into ways to minimize issues related to Enterprise home pages profiles. Currently these profiles are shared and so changes can dramatically effect more than one library. Further the HTML behind the page is complex and not user friendly. A couple of libraries are testing approaches to these questions.

It was asked, when would E-Library go away? Jessie said that they are waiting on Enterprise to become stable. But anticipate at the end of the fiscal year.

Jodie would like more feedback about Enterprise. Perhaps as a survey question?

Tip of the Month

The tip of the month has been inactive for the last year, but Beth will work on reviving it. Jodie reported that membership seemed to have positive view of it.

MSC Survey

The hyperlink subcommittee has a few questions they would like to ask the membership. It was thought that the MSC Executive board would survey this fall, but they are not. They may survey in the spring. The ad hoc committee on collaborative cataloging is also looking to survey the membership. Board members felt a single survey with the ad hoc committee given at the fall membership meeting would give good results.

Katy suggested that the survey be announced in advance so people could be more prepared to give good answers. It was suggested that the committee use email to propose survey questions. Jodie agreed to start this email. The questions would then be forwarded on to Jessie who would create the survey. This survey will need to be completed by September 15th to be posted with the rest of the MSC executive board materials. The next ad hoc meeting will be August 25th.

Peer Training

Bobbi requested help with her idea, The Winter Webinar Series. The focus of this series will be on Peer-to-Peer training. This series of webinars will present different aspects of the SCP. It will be live on the Tuesdays between January 3 and February 28. Committee members were asked to volunteer for a particular section of the SCP. For each session a committee member would talk, live, for 45 min. These sessions will then be edited and archived so that people not at the training could also benefit. Bobbi would moderate these sessions. The series will be announced at the fall workshop.

[After the meeting Bobbi posted a list of who volunteered for what included below.]

SCP section*	Date	Person(s) responsible
2	January 3 rd	Jemma Hazen/Bobbi deMontigny
3 through 3.1.5	January 10 th	Jodie Moore
3.2 through 3.5	January 17 th	Beth Boyson
4	January 24 th	Jemma Hazen/Bobbi deMontigny
5	January 31 st	Paulette Parpart (pending confirmation)
6	February 7 th	Stephan Licitra/Laura Tretter
6	February 14 th	Stephan Licitra/Laura Tretter
7	February 21 st	Lyndy Bartlett (pending confirmation)
8	February 28 th	Carly Delsigne/Katy Callon

*Bobbi deMontigny will present sections 1 & 9 before and after each presentation.

Bobbi has also been working hard to develop a curriculum for her training program. It will include videos, handouts and exercises. Stephan asked if there could be a test at the end, so that people would know where their skill set was. Bobbi said that wasn't part of the curriculum now, but would look into the idea.

Other

Jodie will update the executive board at their next meeting, September 7th and October 6th. Jessie suggested the CMC update the executive board at all their meetings in the future. Jodie will also update the Membership at their meeting on October 7th.

Interim projects

Duplication and low record standards (Jemma will look into)
Smartport recommendation (Jodie will send out)
Tip of the Month (Beth is working on)
Video on tracings (for MSC)
Survey questions (Send to Jodie who will forward them to Jessie)
Changes to SCP
Subcommittees

Proposed agenda items

Recommendation on how to use de-duping project money.
Review of language and format of the SCP.

Adjournment

Meeting adjourned at 1:15. The next meeting will be in person in March 2017.